



Walsall Council

# How to Transition into Service Design

## Case Study and Insights



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# How to transition into Service Design

Case study and insights

BAs developing service design capability and adding to their toolkit isn't as far-fetched as you might imagine.

This workshop provides insight into transitioning from a pure BA role into service design and includes a case study example of just how Service Design can be exercised in practical terms.

We will be introducing elements of the service design toolkit and will provide practical take aways that can help BAs break new professional ground.

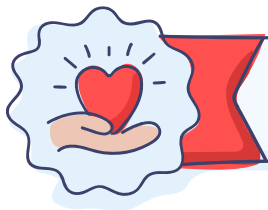


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# Service Design Insights

## Socitm Advisory and Walsall Council Partnership

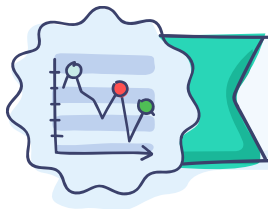
# Socitm Advisory and Walsall partnership



***Improve outcomes and customer experience***



***Improve employee satisfaction and engagement***



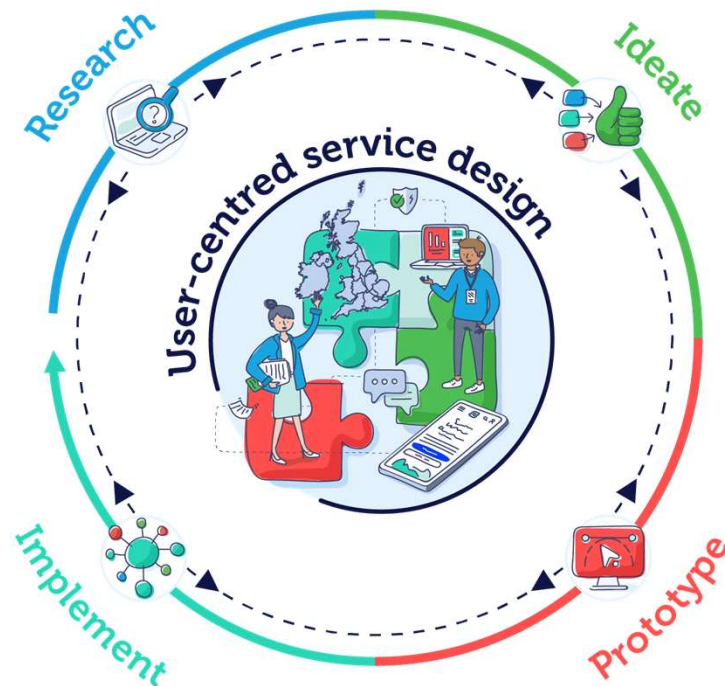
***Improve service efficiency and performance***

We help organisations delivering public service to thrive.

We're a transformation partner, working with public service leaders to improve the services they deliver. We maximise organisational efficiency and effectiveness and help create customer and employee centric services by embracing people change, technology, data, innovation and modernisation.

We take a partnership approach to building capabilities within the organisations we serve, to support their own continuous improvement.

# What is Service Design?



*Our Service Design Approach at Socitm Advisory*

For Walsall Council, Service design covers the end-to-end process of:

- Understanding 'as is' service delivery
- Identifying improvements and opportunities for efficiency
- Mapping customer journeys, touch points and pain points with detailed data and supporting information to inform customer improvements and other dependent work.

The outputs from service design then feed into detailed design and delivery work (customer contact, CRM, website and behavioural change).

# Our Service Design Approach

## Research

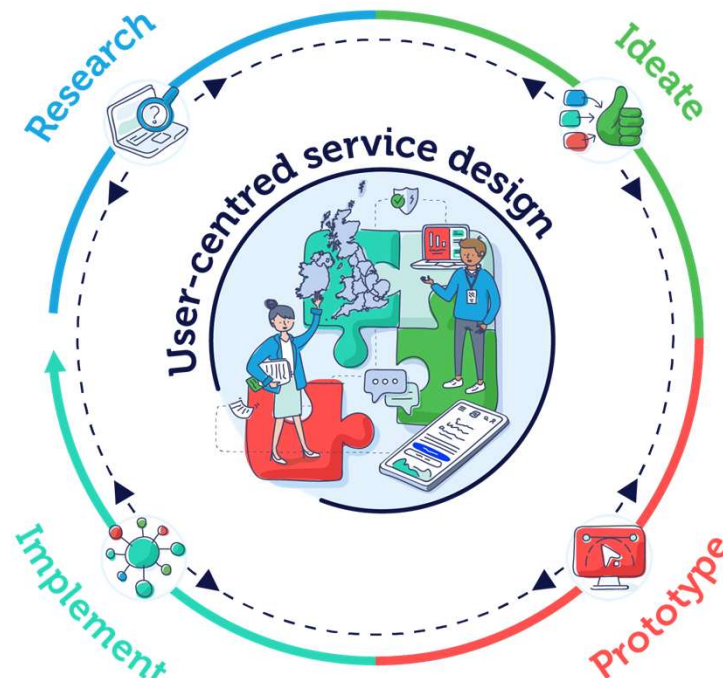
Conducting **research** and data analysis to build a conceptual view, visualising the whole situation, the people and behaviours, and their interactions with your service

Using this **insight** to define a project with a user centered perspective

## Implement

Overseeing and supporting the **implementation**, including how best to co-design, build, test and rollout your chosen product or service change successfully

Providing the **management framework**, including oversight, governance and steer throughout the design process.



## Ideate

Creating a collaborative space for **ideation** – starting with ideas that we evolve together

We provide the guidance and iterative adjustments needed to ensure your **outcomes** are met throughout our engagement, leaving you with a toolkit that you can use again

## Prototype

Using **prototyping** techniques to explore, assess and experience how users might experience or perceive the product or service

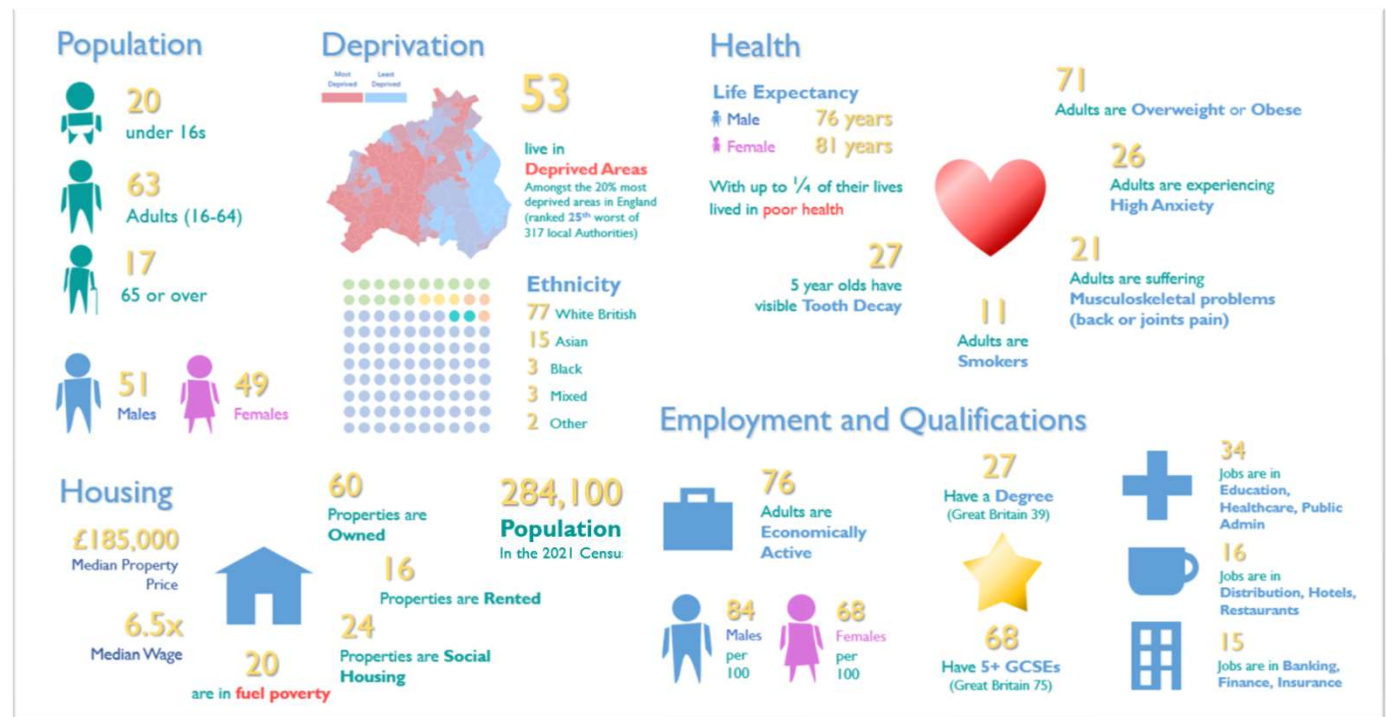
Helping you to choose and **evaluate** which prototype may be most suitable, taking in to account the people, process, IT and organisational constraints and opportunities.

# A focus on the customer

## High Level Insight

- Walsall has two different customer groups – **most and least deprived**
- A high **minority ethnic population**, many who speak multiple languages
- There is a huge difference in the **housing situation**, with over 20% in fuel poverty
- **Unemployment is high**, and there is also high proportion of entirely **economically inactive households**
- The age of death is 9 years below the national average, combined with a **growing aging population**

## If Walsall were 100 people...

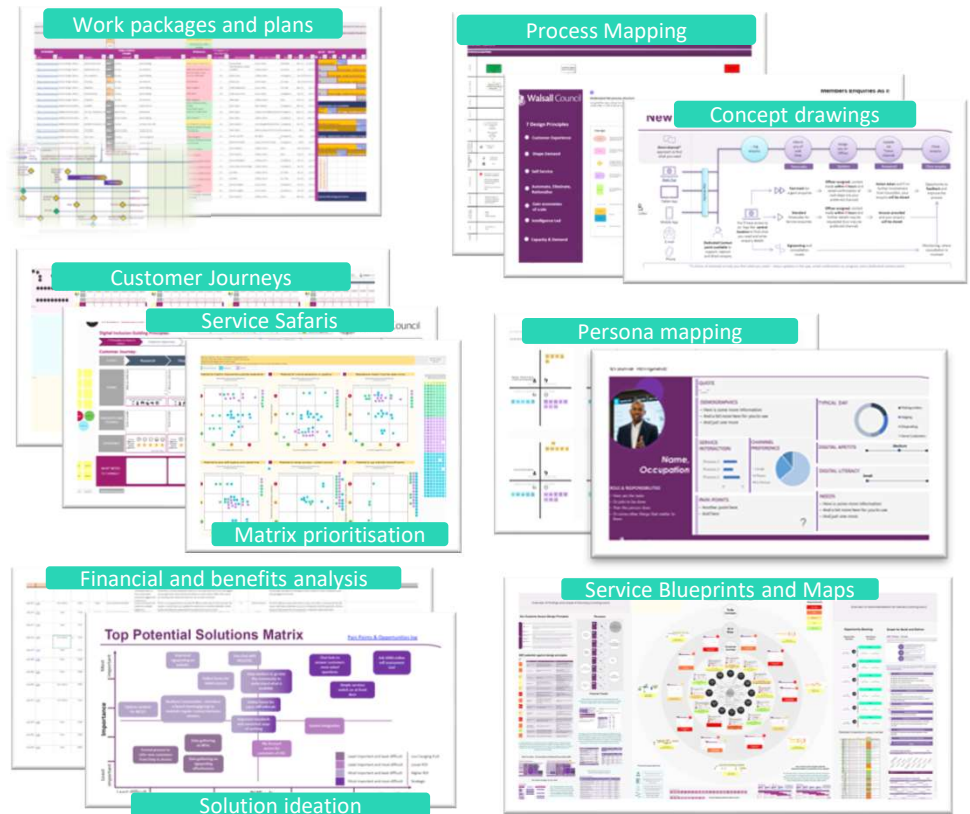


**A number of cross-delivery teams including business and technical analysts, user researchers, technical SMEs and service leads. 2023 initiatives listed below:**

- 👍 Redesigning 12 customer-facing services
- 👍 Chatbots for external customers
- 👍 Grow our Customer Experience Centre
- 👍 Deliver RPA across Customer Services
- 👍 Automate member/customer enquiries
- 👍 CRM data quality and migration
- 👍 Delivering a CRM solution/Core Technology Platform
- 👍 Improving customer interactions into Business Systems
- 👍 Create a single view of debt in Walsall
- 👍 Create a single view of customers
- 👍 Redesign the Social Care front doors
- 👍 Implementing customer portals
- 👍 Better care finance and support
- 👍 Channel shift strategy and communications
- 👍 Golden Number migration
- 👍 Web and rapid process transformation

# How we were delivering this

**Example toolkit and templates used:**





# Top challenges we faced at Walsall Council



## Community co-design

Selecting and engaging small groups of Residents to help re-design services



## Balancing the day job

Supporting people to take 'time out' of the workday to change the way their Services work



## User research

Increasing how and when we engage with the Community to meet their expectations



## Sharing knowledge

Learning from others to share knowledge, replicate great work and avoid mistakes



## Resourcing and skills

Finding and keeping people with the right skillset for transformation and change



## Budget pressures

Finding new and creative ways to transform services to help alleviate budget pressures

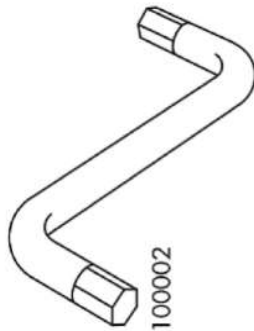


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# Service Design

## Case Study

# Background – 29 Years in retail



## The journey towards being a BA

- 29 years in a blue and yellow box
- 9 years in Project Implementation at UK&IE and Global Logistics
- UK&IE Project implementation manager
- Took redundancy in 2019
- Career choice...

## What do I do now?

# What brought me to the Business Analyst Role...



## What is a Business Analyst?

The journey...

- Vacancy at Local Council
- Council Job Description fitted my skillset
- Local Council Values

*Why not give it a go?*

# A Business Analyst in Public Services



- New BA, the only Internal BA
- Service Transformation
- Working with Consultant BAs

## **My development:**

- Working with external BAs
- BCS Courses
- Level 4 BA Apprenticeship

## **Team development:**

- Recruit and Develop internal team of BAs
- 3 BAs on board
- Vacancies – Recruitment challenges
- Develop from within council

# Enablers of the work



## Walsall has developed a Customer Service Strategy which sets out how we want to interact with our customers.

We are working with customer facing services to identify opportunities to improve customer experience and streamline processes, resulting in savings.



### Establish and optimise Customer Experience Centre

Providing an effective common front door that will also drive wider customer transformation.



### Customer Relationship Management (CRM) system

Ensuring the enabling technology required to support easy digital interactions for customers.



### Council website transformation

Enabling the web to be fit for purpose as the key gateway for customers in the future.



### Customer-centric culture and behaviours

Working with service staff and customers to manage demand more effectively.



### Rapid process improvements to deliver quick wins

Implementing non-technology dependent changes in all services.

	'CX' Centre	CRM	Web	Culture change	Quick wins
Service focus for 2022	Adult Social Care	Very High	Low	High	High
	Highways	Low	High	Low	Low
	Clean and Green	Medium	High	Medium	Medium
	Regulatory Services	Low	High	Medium	Low
	Sports and Leisure	Medium	Medium	High	Medium
Service focus for 2023	Resilient Communities	Low	Low	Medium	High
	Planning	Medium	Medium	Medium	Medium
	Building Control	Low	Medium	Low	Low
	Registrars	Medium	Medium	High	Medium
	Bereavement Services	Low	Medium	High	Low
	Revenues & Benefits	Very High	Medium	High	High
	Children's Services	High	Medium	Medium	Medium

Potential area of opportunity for the Service

Assumptions based on early findings

# Hybrid Service Design BA on Walsall's Customer Access Programme

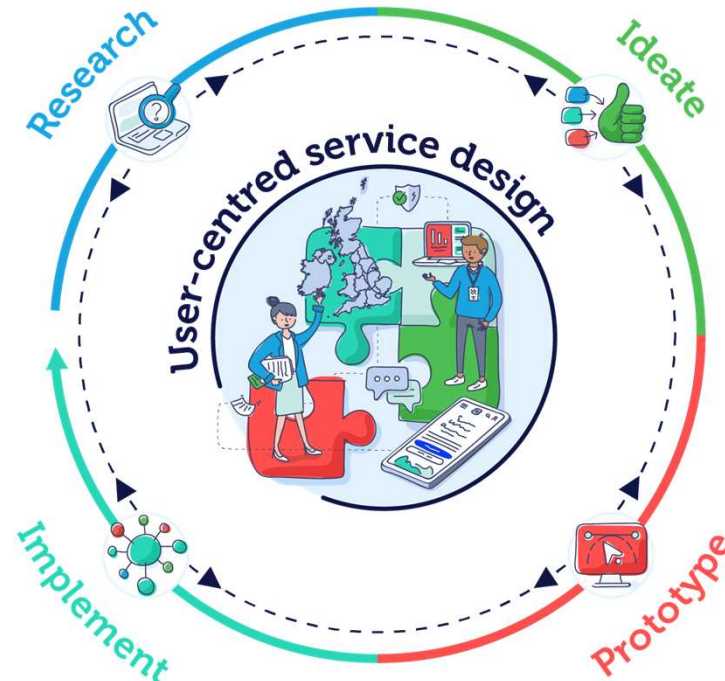
## A real example - redesigning a Council Sports and Leisure Service

### Research

- Data Gathering
- Stakeholder Mapping
- System Mapping
- Customer Journeys
- Customer Personas
- Service Safari

### Implement

- Handover to Delivery
- Co-design working group
- End to end BA support



### Ideate

- Stakeholder Engagement
- Stakeholder Communication Plan
  - Service Area Working Group Updates
  - As-is process mapping
- As-is opportunities elicitation
- Categorisation of opportunities

### Prototype

- Opportunities Playback sessions
- Opportunity development and prioritization
  - Cost/Benefit Analysis
  - User Story Development
- Transferring User Stories to Dev Ops

# Examples – Service Design role on Customer Access Programme

## Research – Customer Journey – Booking a child's party

**Customer Journey:**

STAGES	Research	'Shop' for info	Booking / order	Transaction	Post-transaction	Receive service
DOING	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do
THOUGHTS AND FEELINGS	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do
EXPERIENCE	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do
WHAT NEEDS TO CHANGE?	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do	What you want to do What you need to do What you have to do

## Implement – User stories shared with delivery

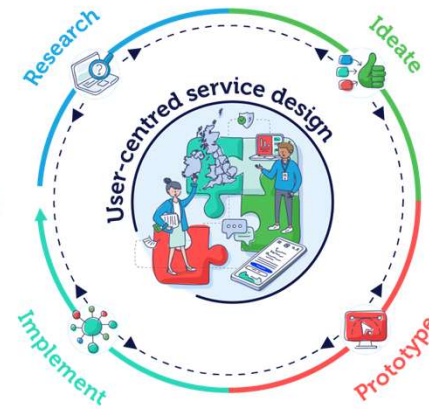
Handover to Delivery. Co-design working group.

**Book a Party - 3. Eform Development.**

**Description:** As a member of staff I could fill an online form to be checked for what makes booking with the customer containing all information needed for party booking so that I do not have to keep manual appointment and files for party bookings.

**Blocked Reason:** Following on from Book a party 2. Select available slot.

**Technical Details:** The customer would need the option to select the required Party slot by clicking on a button (book party slot) which would then direct them to an online form. We have existing Party Booking forms that are used by the service that we wish to transfer into an online form. I have completed a piece of work comparing the old and the new and have different recommendations for new online information from the customer. So depending on the type of party that the customer selects we need to show the introduction text for that type of party and the associated costs.



## Ideate - as-is opportunities identified

14 Opportunities categorised as BAU - Day to day opportunities being fed back to the service.

- Maintenance/IT issues.**  
Tablets in reception  
Codes on doors,  
Turnstile functionality  
Ticket system  
Pictures on membership cards
- Website development**  
Reading age  
Covid messaging.  
Better promotion of services
- Membership options**  
Simplify membership options.  
Better information on options
- Harlands Service quality.**

## Prototype – Opportunities Playback



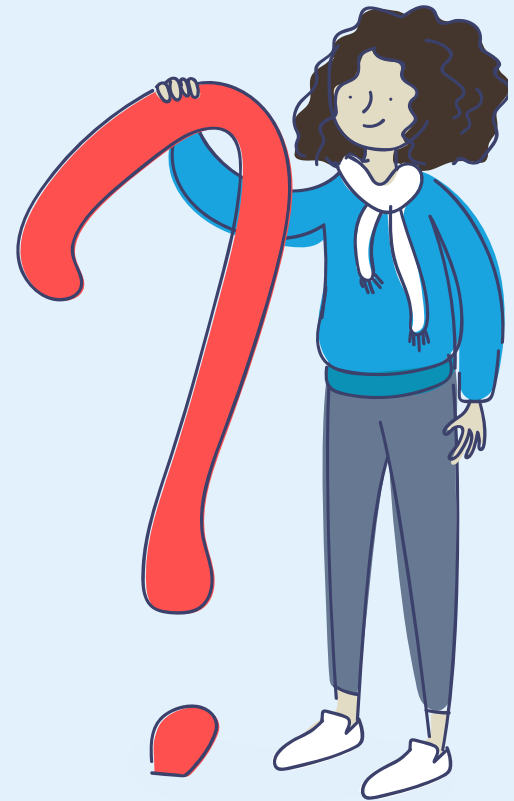
- BAU (14)** – Opportunities have been fed back to the service and will be dealt with as Business as Usual.
- Discounted (2)** - Service have reviewed these previously and do not wish to progress.
- Out of Scope (18)**– Opportunities that are out of scope for the CAM Programme, being dealt with in other areas/projects.
- In Service Backlog (7)** - Opportunities that the service already has in planning/progress
- CAM Opportunities (57)** – Opportunities that are being progressed further within the CAM programme



Exercise 1 – 10 mins

**What challenges might there be in moving from BA to Service Design?**

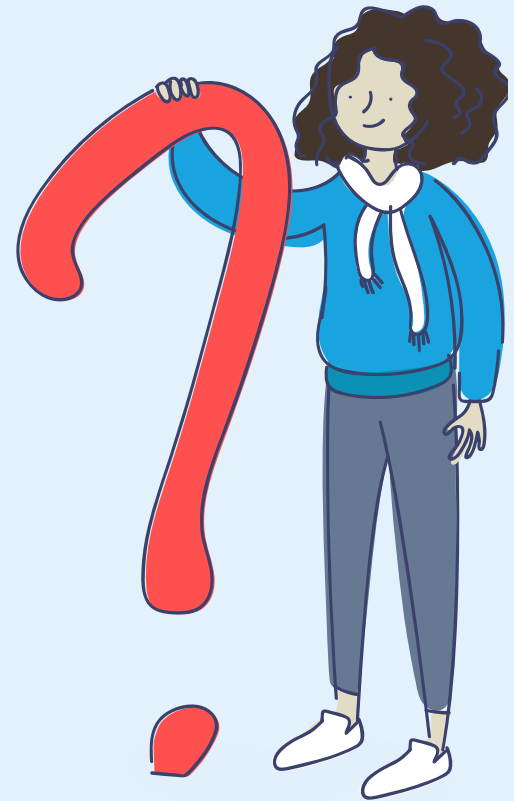
What tools might be needed, what hints and tips for gaining knowledge, what impediments might be encountered.



Exercise 2 – 20 mins

**What is the difference/overlap  
between the BA and SD Role?**

Inc. 10 mins - Wrap up discussion





# Service Design Consultancy & Business Analysis Service Frameworks



Jonathan Hunsley - AssistKD



### Situation investigation and problem analysis

- Investigate, analyse and state problem
- Clear, defined solution scope




### Requirement definition

- Business-aligned requirements
- Accurate and precise requirements



### Feasibility assessment and business case development

- Relevant, feasible options
- Rigorous financial case



### Business acceptance testing

- Tested and accepted solutions



### Business process improvement


- Well-formed process models
- Efficient and effective, holistic redesign



### Business change deployment


- Business-ready environments
- Value co-created

**Stakeholder Engagement** is an auxiliary service.




### Situation investigation and problem analysis

Investigate root causes of problems; identify where need for service change exists and shape the Service Design project.




### Service definition

Define service blueprint and value proposition; design service value stream; identify service capability requirements.




### CX Analysis

Research voice of the customer and analyse service value expectation.



### Service experimentation

Design and develop service prototypes on the basis of hypotheses; elicit and analyse qualitative and quantitative feedback.



### Feasibility assessment and business case development

Evaluate options for revised service; support the development of the business case for service change.



### Service deployment

Support service deployment; monitor feedback from service customers and delivery staff; maintain service.

**Stakeholder Engagement** is an auxiliary service.



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# Service Design Toolkit

# Examples and templates

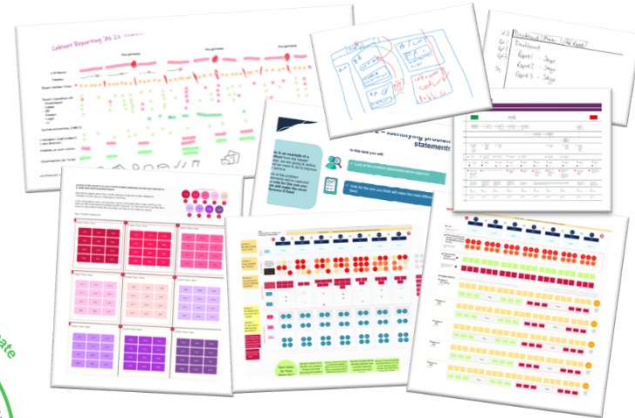
## Research

Data Collection  
Data visualisation and analysis



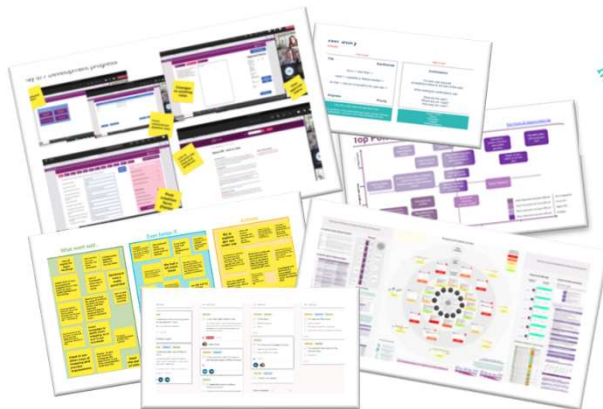
## Ideate

Generating ideas  
Adding depth and diversifying ideas  
Understand, cluster and rank  
Reduce the options



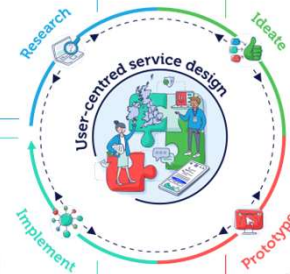
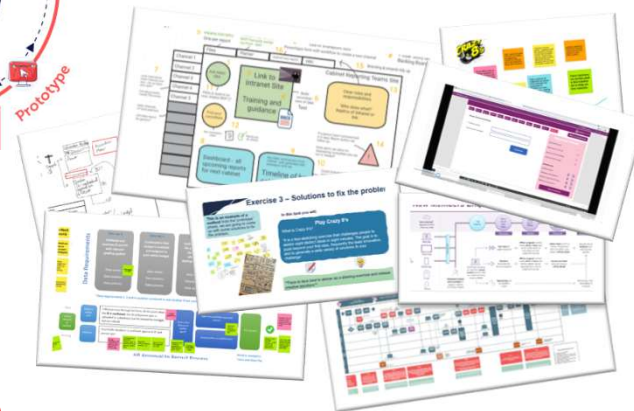
## Implement

Change Management  
Software development  
Product management  
Design architecture

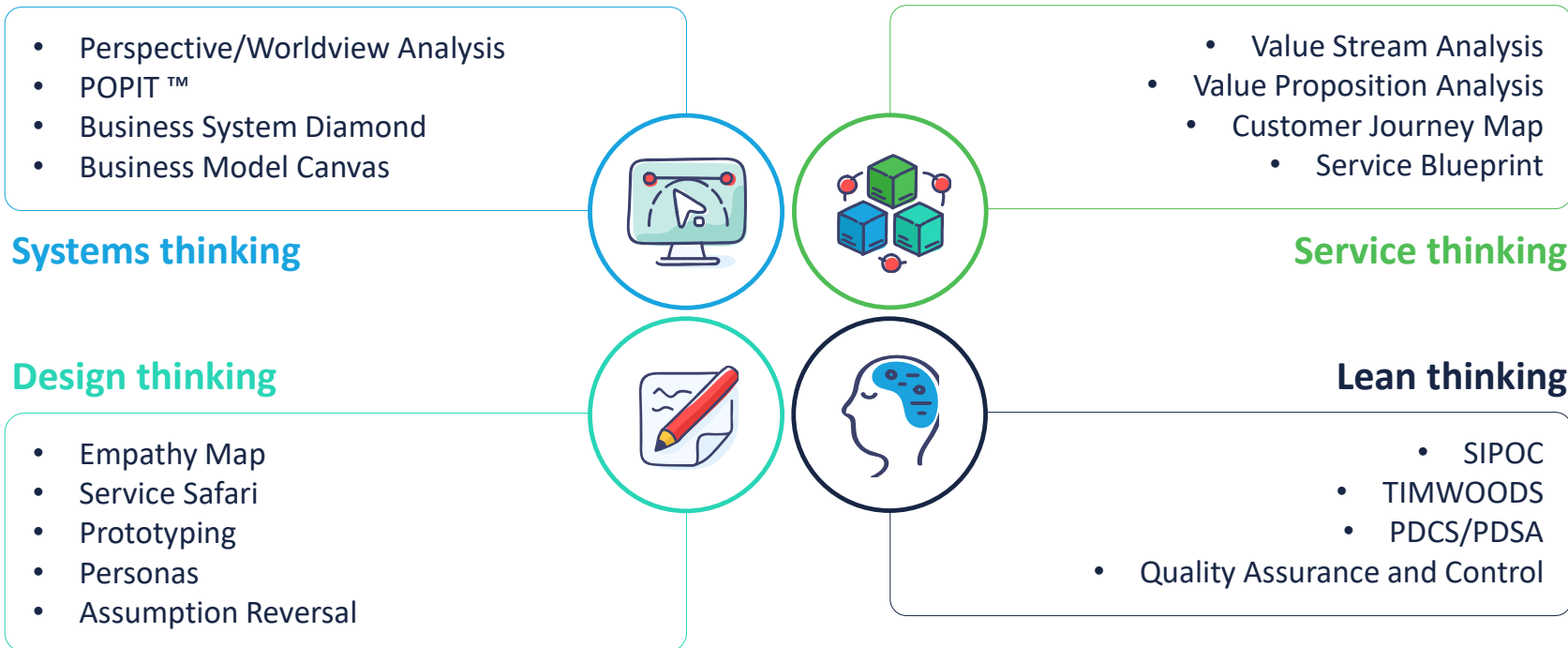


## Prototype

Service processes and experiences  
Objects and environments  
Prototyping for digital  
Ecosystems and business value



# More examples



Many other Business Service Design tools and techniques exist

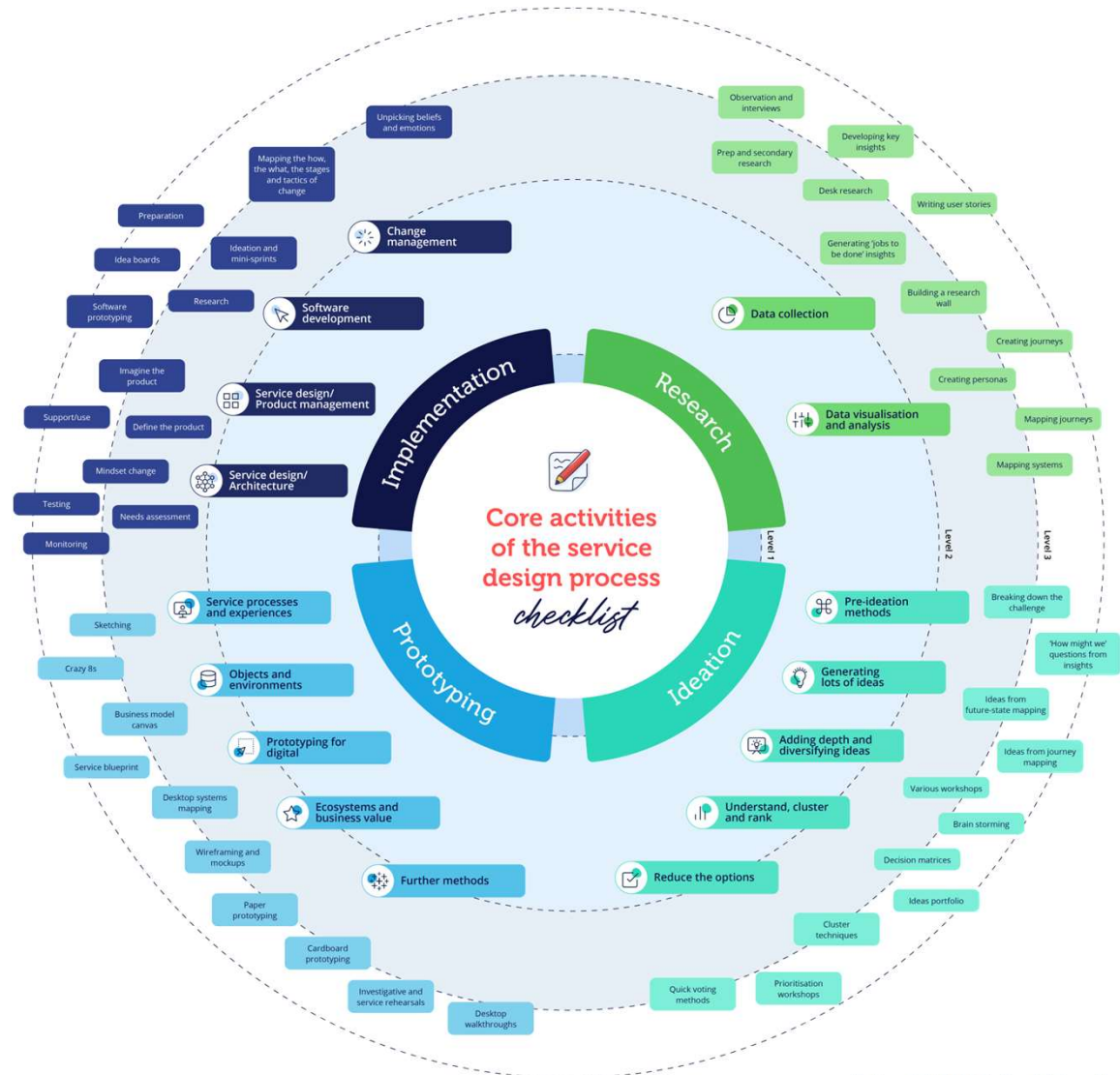


# Pick'n'mix techniques for Service Design

It's very small on the screen, so this list will be provided as [a 'take away' PDF](#).

We can provide or create templates and guidance for all these techniques.

- ▶ *Treat like a pick list as discovery progresses – not an exhaustive list*
- ▶ *Note that the activities can overlap and are not mutually exclusive*
- ▶ *Based on good practice from the Global Service Design Community*



# Some great resources!



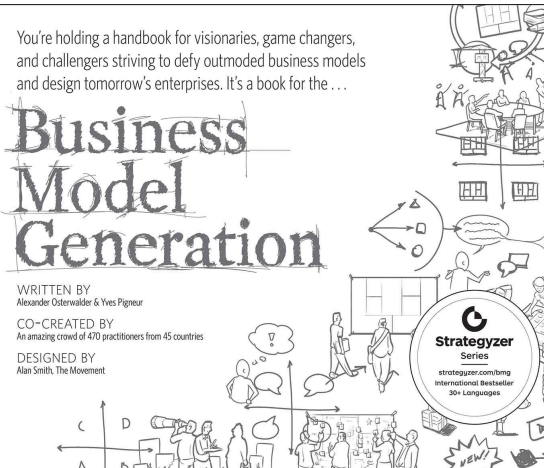
## The Service Innovation Handbook

Action-oriented creative thinking tool kit for service organizations

TEMPLATES - CASES - CAPABILITIES



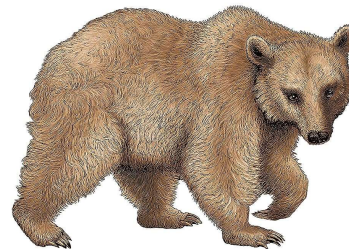
Lucy Kimbell



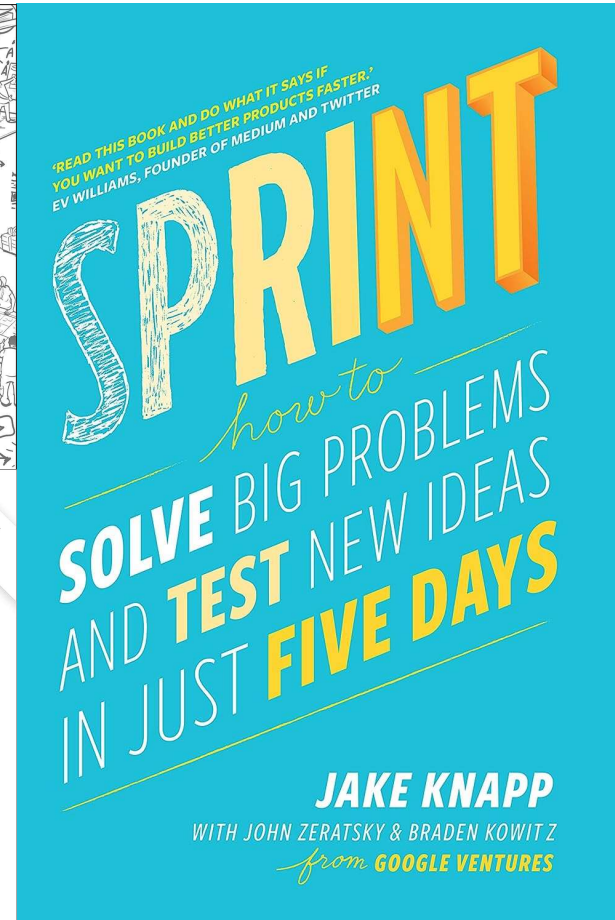
O'REILLY

## Mapping Experiences

A Complete Guide to Customer Alignment Through Journeys, Blueprints & Diagrams



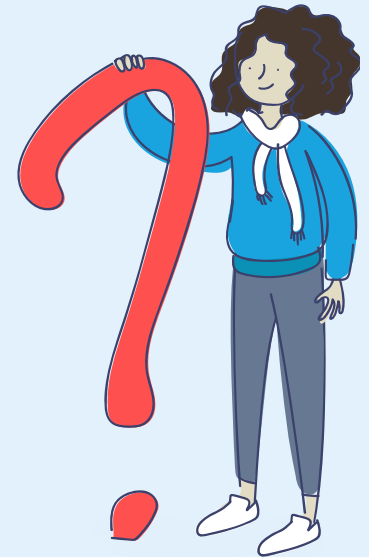
Jim Kalbach



## Exercise 3 – 10 mins discussion

**1) Would you be interested in joining a dedicated Service Design Community?**

If interested, sign up here →



**2) Discuss what purpose the dedicated Service Design Community would have.**



# Q&A



**Joanne Frances**

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Socitm Advisory*

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